WISENET ACCOUNT TRAINING USER MANUAL

Any questions: Contact Akemi – akemi@teg.com.au

UPDATING PAYMENTS

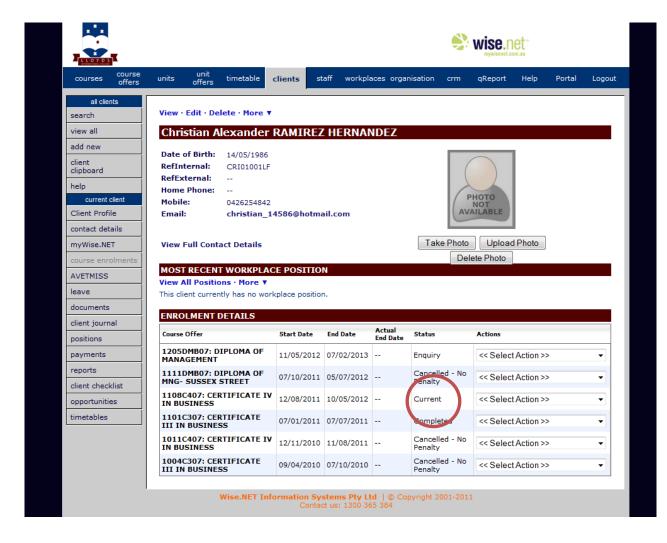
Step 1: Find a student

Clients -> type in student name/number/both -> click search -> click on the name of the student

| THE REAL PROPERTY. | | | | wise. | net" | | |
|--|--|-------------------|--------------|--------------------------------|-------|-----------------|--------|
| courses course offers | units unit timetable client | s staff w | orkplaces or | ganisation crm qReport | Help | Portal | Logout |
| all clients search | | | | | | | |
| view all | Client Search | | | | | | |
| add new | Please enter search criteria: RAM | MIREZ | | | | Sea | arch |
| client clipboard | Only Client Identifies | | | | | | |
| help | ⊞ Advanced search criteria | | | | | | |
| client wizards | | | | | | | |
| enrol clients enrolment update | Name | Student Number | D.O.B | Email Address | Phone | Mobile | |
| wizard | Jaime Alberto ARANDA RAMIREZ | CRI0100289 | 26/04/1968 | arandamvz68@hotmail.com | | 0449539351 | 6 |
| update status client position | Fabian Alvaro CONTRERAS RAMIREZ | CRI010006T | 17/03/1974 | fabian.alvaro@gmail.com | | 0406968361 | 6 |
| search | Broz Tito RAMIREZ CALLE | CRI01000XN | 16/04/1982 | adulterio2@hotmail.com | | 04 020 98271 | â |
| mail merge call centre | Christian Alexander RAMIREZ HERNANDEZ | CRI01001LF | 14/05/1986 | christian_14586@hotmail.com | 1 | 0426254842 | ā |
| | David Alberto RAMIREZ MENDOZA | CRI01002QZ | 14/03/1982 | david- ramirezm@hotmail.com | | 0424414530 | â |
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| Wise.NET Information Systems Pty Ltd © Copyright 2001-2011 Contact us: 1300 365 384 | | | | | | | |

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Step 2: Open current enrolment



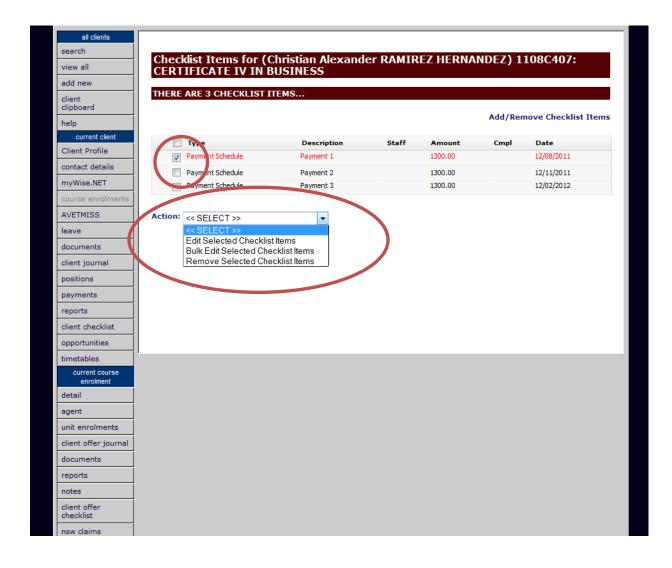
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Step 3: Click on "Client Offer Checklist"

| all clients | | |
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| search view all | | |
| view all | | |
| add new Course Enrolment for Client: C | hristian Alexander RAMIREZ HERNANDEZ | |
| client clipboard | | |
| help | | |
| Course Offer*: | 1108C407 - CERTIFICATE IV IN BUSINESS | |
| Client Profile | | move |
| contact details Study Mode*: | Full Time (FT) | |
| myWise.NET Co-ordinator: | Amit Thakur | |
| Sign Date*: | 12/08/2011 | |
| Nominal End Date: | 10/05/2012 | |
| Actual End Date: | | |
| leave Expiry Date: | | |
| documents T'ship/A'ship Length (mths): | | |
| client journal eCoE Number: | | |
| positions Target Group: | | |
| payments AVETMISS/REQUIRED | | |
| reports For Avetmiss: | | |
| client checklist Study Reason (AV6): | | |
| opportunities Commencing Course Identifier (AV6): | | |
| timetables Eligibility Exemption: | N | |
| current course VET Fee-Help: | N | |
| enrolment Qualification Issued? | | |
| detail Year Issued: | | |
| agent Training Plan Issued? | | |
| unit enrolments | | |
| client offer journal | | |
| documents Enrolment Status: | Current | |
| reports Status Reason: | | |
| notes Certificate #1: | | |
| client offer Certificate #2: | | |
| checklist Privacy Flag: | | |
| nsw claims Registration ID: | | |

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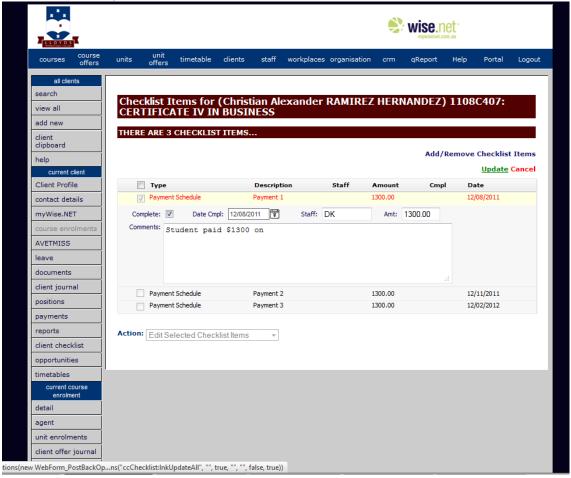
Step 4: Select the installment for which you need to update the payment and choose "edit selected checklist item" from the action drop down menu



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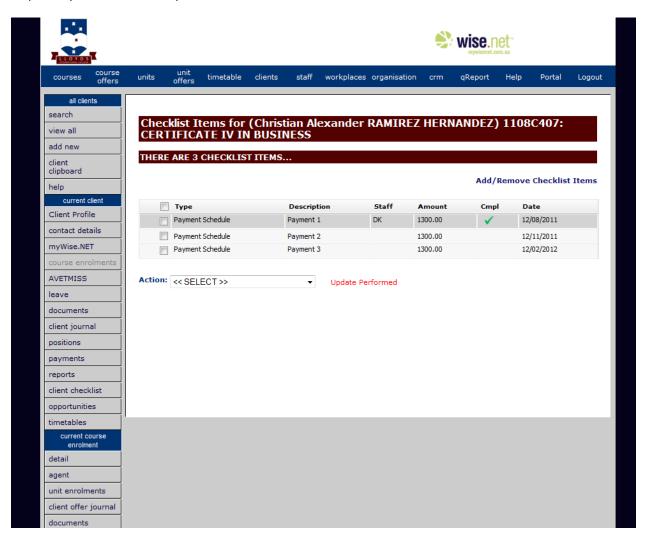
Step 5: Update the payment details

- Tick the 'Complete' box if the checklist is complete
- Enter the due dates
- Enter numerical values into the AMT field (eg. fees, %, etc)
- Your name into the Staff Field
- Additional notes into the Comments field
- Click Update



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Step 6: Payment Record is updated

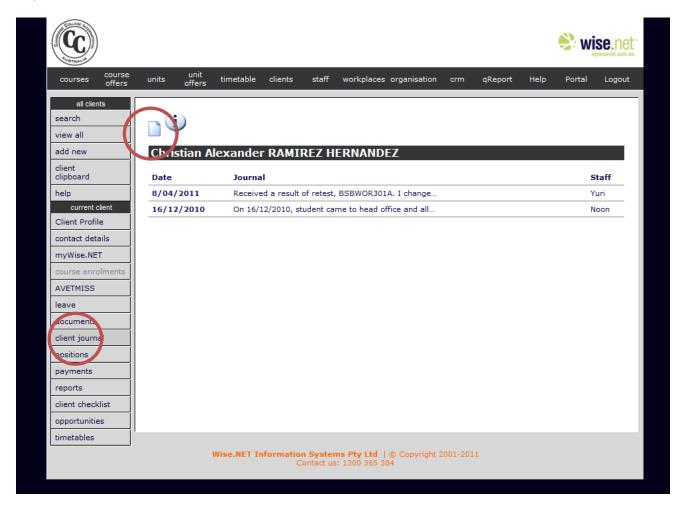


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RECORDING COMMUNICATION

Step 1: Click on "Client Journal"

Step 2: Click on "NEW record"



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Step 2: Enter your notes

Journal Date Field: Date when communication took place

• Notes Field: Record you notes

Staff Field: Your name

• Time: Time when the conversation took place

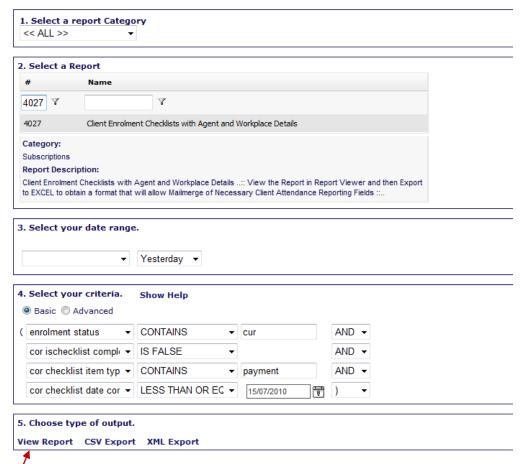
• Click update



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Steps to generate intention to report letters for non-payment of fees from wisenet

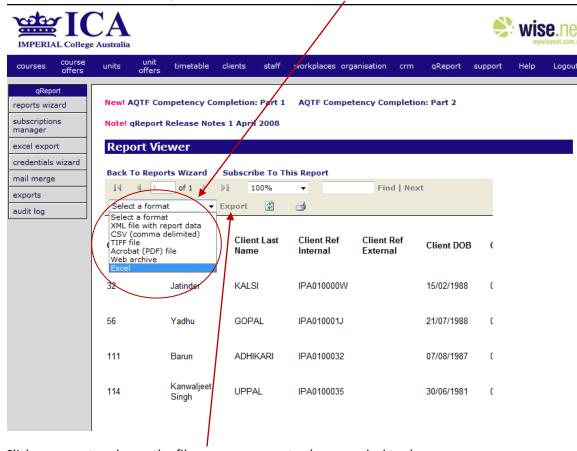
- 1. Generate report to find out which students have overdue payment. To do that you will need to:
 - a. Click on the qReport button on the top navigation bar
 - b. Choose report number "4027" Client Enrolment Checklists with Agent and Workplace Details
 - c. In the selection criteria number 4 "4. Select your criteria", choose the following:
 - i. Enrolment status contains current AND
 - ii. Cor ischecklist completed is false AND
 - iii. Cor checklist item type contain payment AND
 - iv. Cor checklist date completed less than or equal (choose the day when you generate the warning letters)



This criteria will give you a list of students, who are currently enrolled and started the course, who have payment schedule set up is the due date of the installments is the date of when you are generating warning letter or before that.

2. Click on view report at the bottom of the page

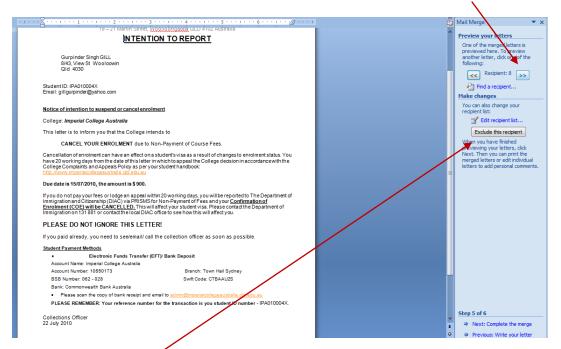
3. Click on "select format" drop down menu, and select - excel



- 4. Click on export and save the file on your computer (save on desktop)
- 5. Open ITR template (word document)
- 6. Click on tools option and select "letters and mailing" "mail merge". After selecting this option you will have a menu on the side to complete the mail merge



- 7. Click on "Next: Starting document" at the bottom of mail merge menu
- 8. Select "Use the current document" and click "next: select recipients"
- 9. Select "use an existing list" and click on "browse" to open the excel spreadsheet with the report, that you generated from wisenet. (step 1-4)
- 10. Click "Next: write your letter"
- 11. Click "next: preview your letters"
- 12. You can check all letters that details are correct by clicking right and left buttons



- 13. If they are some blank letters, or wrong details, you can exclude a letter be click "exclude this recipient" button.
- 14. Click on "Next: Complete the merge"
- 15. Click on Print, and it will print all letters for all students.